Designer User manual

FermiPoint

This user manual covers the core procedures those with designer permissions can perform in FermiPoint- a Fermilab-based content management solution that utilizes the SharePoint 2013 platform.

5/5/2013

Contents

1.0 Managing the look and feel of your site

Designers are primarily responsible for the look and feel of a Fermipoint site, for designing and creating pages, document libraries and lists that contributors can access and update.

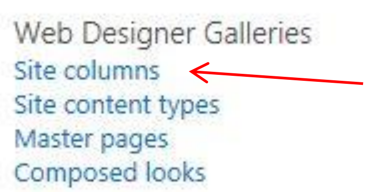
2.0 Managing content across sites

2.1 Add site columns

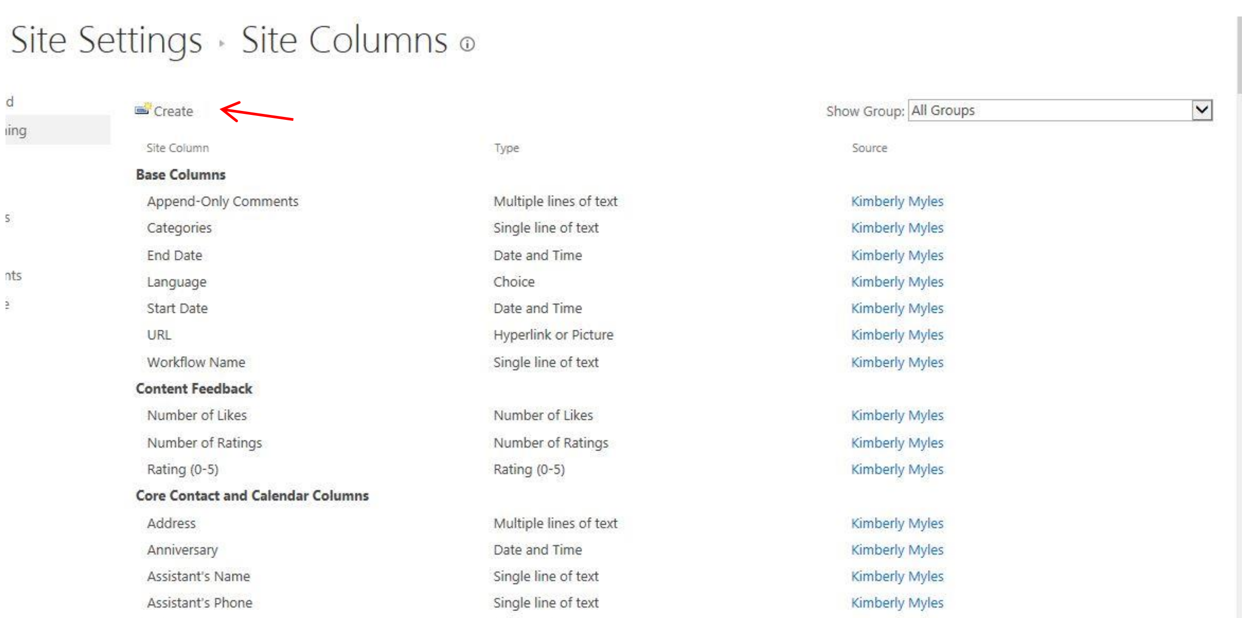
Site columns can be re-used across sites and subsites when you create lists or document libraries in these locations. There are built-in site columns that can be used with categories like core contacts and calendar. Each of these categories have site columns such as start and end date, address etc. available for your use or you can create new categories.

To add a site column:

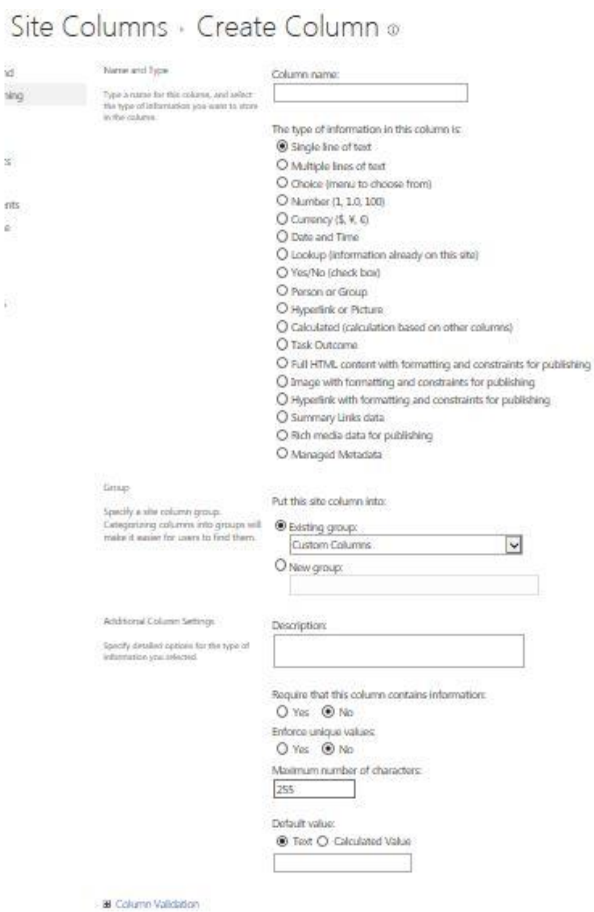
1. Click the gear icon and select **Site Settings.**
2. On the Site Settings page in the Web Designer Galleries area, select **Site Columns**.



3. From the Site Columns page that appears, click **Create**.



4. From the Create Column page that appears, fill out all required fields and click **OK** to create your column.



3.0 Working with Pages

Designers can create pages and add content to these pages in “Page Fields”. Page Fields are the workable areas that content can be added to. Page Fields can contain rich text editors that enable content authors to add and format text, tables, links and images and, depending on the page template selected, they can also contain Web Part zones where Web Parts can be inserted. Pages are set up so that content authors cannot make changes outside of the Page Fields.

3.1 Create a new page

1. Click the **gear icon** and select **Add a page**.
2. From the Add a page dialogue box that appears, name the page and click **Create** to create it.

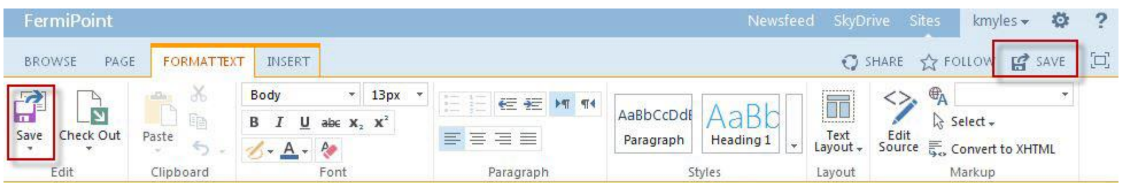
NOTE: To find your page, select **Site Contents** from the quick launch menu.

From the Site Contents page, click **Site Pages** and select the name of your page to access it.

3.2 Edit a page

1. Click the gear icon and select **Edit page** or you can select the **Edit** link on the Top Links bar.

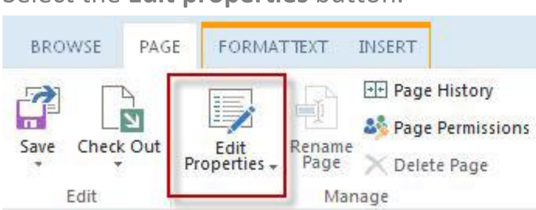
2. Make your desired changes and click **Save** from the ribbon (or the Top Links bar) to save these changes.



3.3 Change a page name

1. Click the **Page** tab.

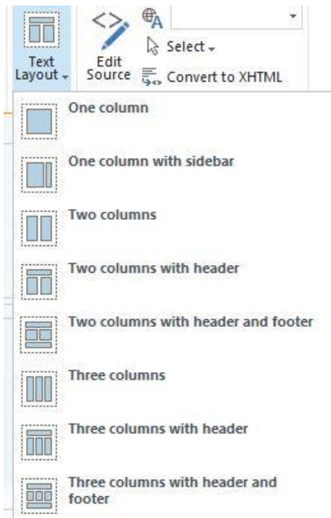
2. Select the **Edit properties** button.



3. From the Edit Properties page that appears, change the name of your page and click **Save**.

3.4 Change the layout of a page

1. Get into edit mode. (Select **Edit** from the Top Links bar)
2. From the ribbon, select **Text Layout** and choose the format you want to apply (i.e. One column, Two columns with header, Three columns etc.)

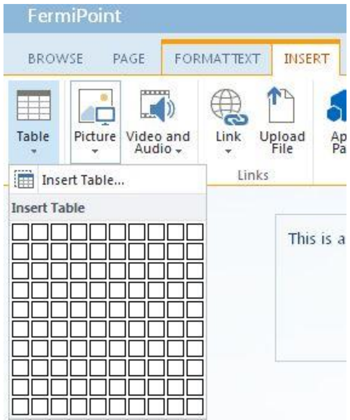


3.5 Insert Content on your page

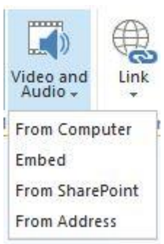
1. Navigate to the page that you want to add content to and insert your cursor in the area where you want the content to appear.
2. Get into edit mode (Select **Edit** from the Top Links bar).
3. Click the **Insert** tab.

4. From the insert tab, click one of the following icons to add the content you want:
   - Click the **Picture** icon and select where to download content from: **From Computer**; **From Address**; or **From SharePoint**.

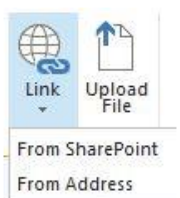
- Click the **Table** icon and select the number of rows and columns for your table by highlighting the number of boxes.



- Click the **Video and Audio** icon and select where to download content from: **From Computer**; **Embed**; **From SharePoint**; **From Address**. (If you select Embed, a dialogue box will appear where you can insert a script or an embed code and click **Insert** to embed it.)

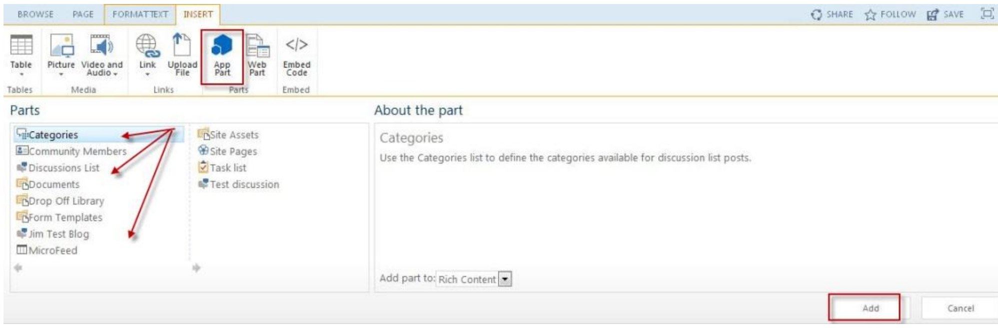


- Click the **Link** icon and select where to download content from: **From SharePoint; From Address.**



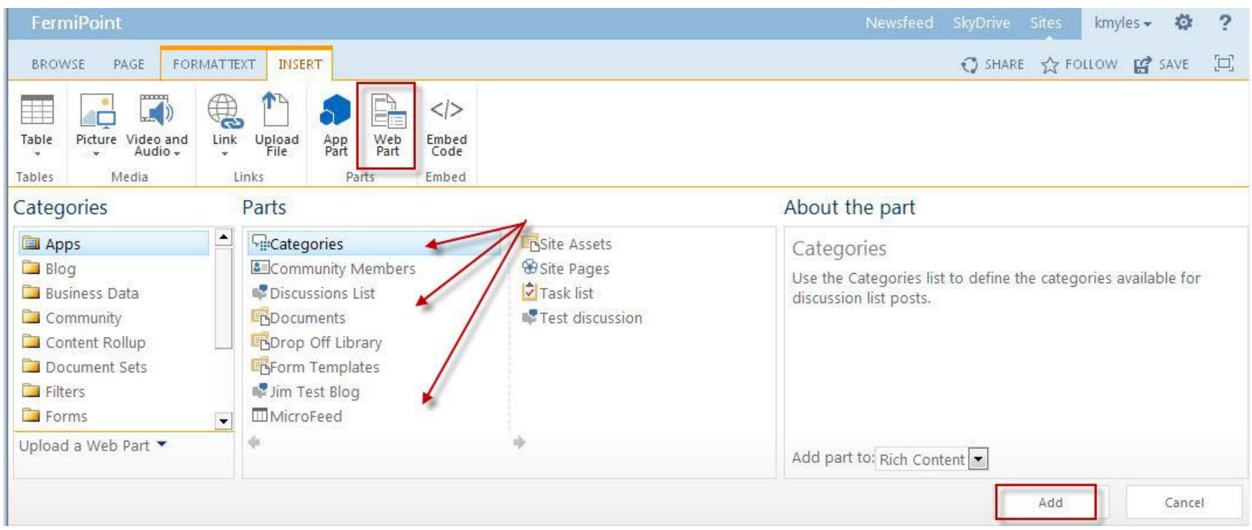
- Click the **App Part** icon and select the App Part you want to add and click **Add**.

NOTE: An App Part can be a Web Part, a list, a library, a button on the ribbon. Essentially, everything in SharePoint 2013 is an App.

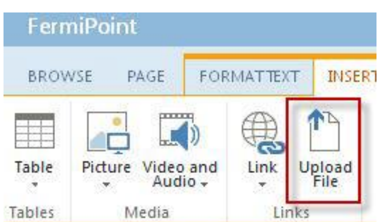


- Click the **Web Part** icon and select the Web Part you want to add and click **Add**.

NOTE: A Web Part is an out-of-the-box feature Designers can add to a page to provide certain functionality. Designers can add Web Parts such as a Calendar Web Part to display a calendar or an Announcements list Web Part to show a list of announcements on a page.



- Click the **Upload File** icon and select the file you want to add to the page and click **OK**.



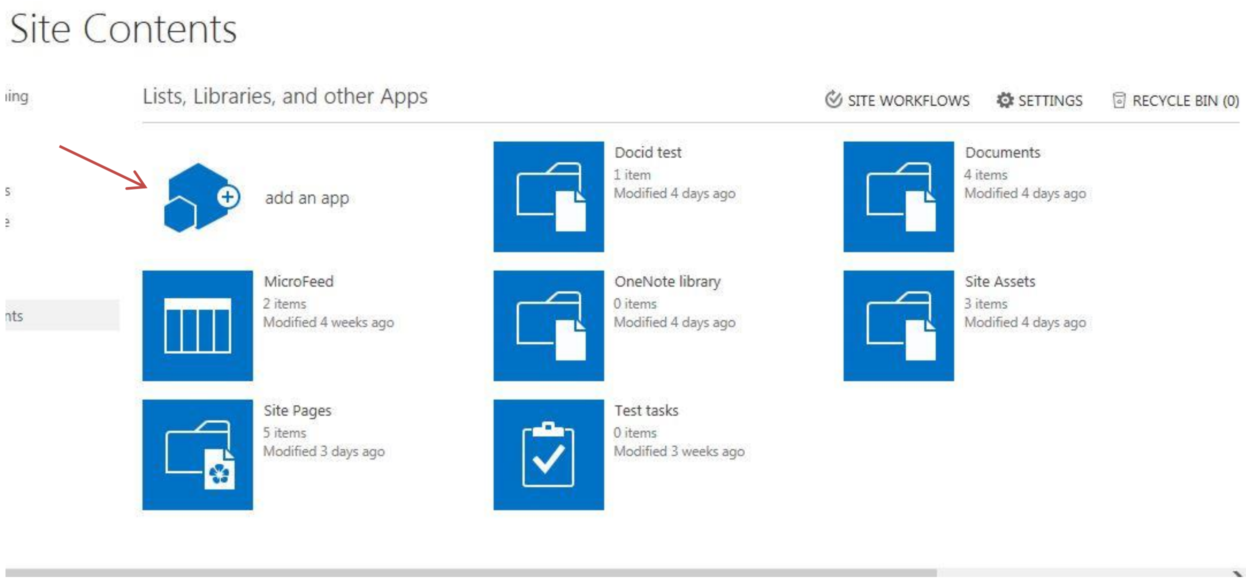
3.6 Add a YouTube video to a page

Before you add a YouTube video for the first time to your site, set up a new Site Assets library to store this video. Once the Site Assets library is created and added to a site, you do not need to perform this step again for that site.

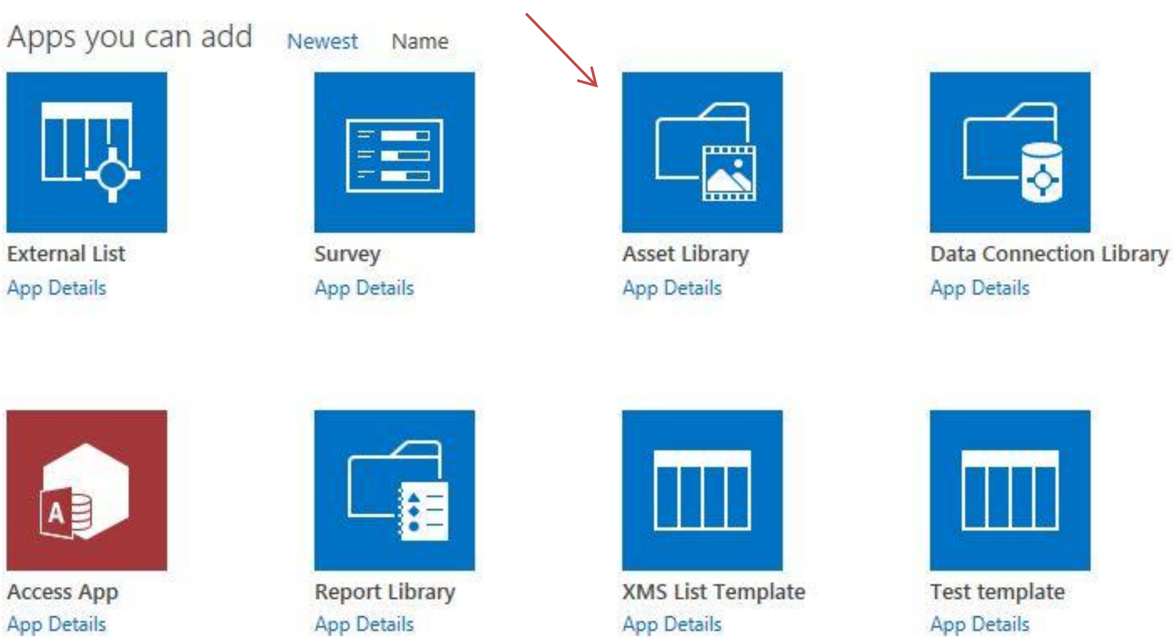
Create a Site Assets Library

1. Navigate to the site you want to host a video on. Click the **gear icon** and select **Site Contents**.

2. From the Site Contents page that appears, click **add an app**.



3. Scroll down to the “Apps you can add” area and select **Asset Library**.



4. From the Adding Asset Library dialogue box that appears, name this library i.e. “Media Library” and click **Create**.

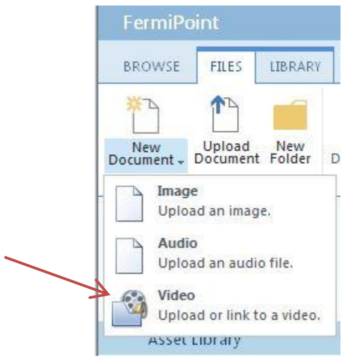
Add a YouTube video to your library

1. Navigate to YouTube and select the video you want to use.
2. Under the video, click **Share**.
3. Click **Embed** and copy the embed code.

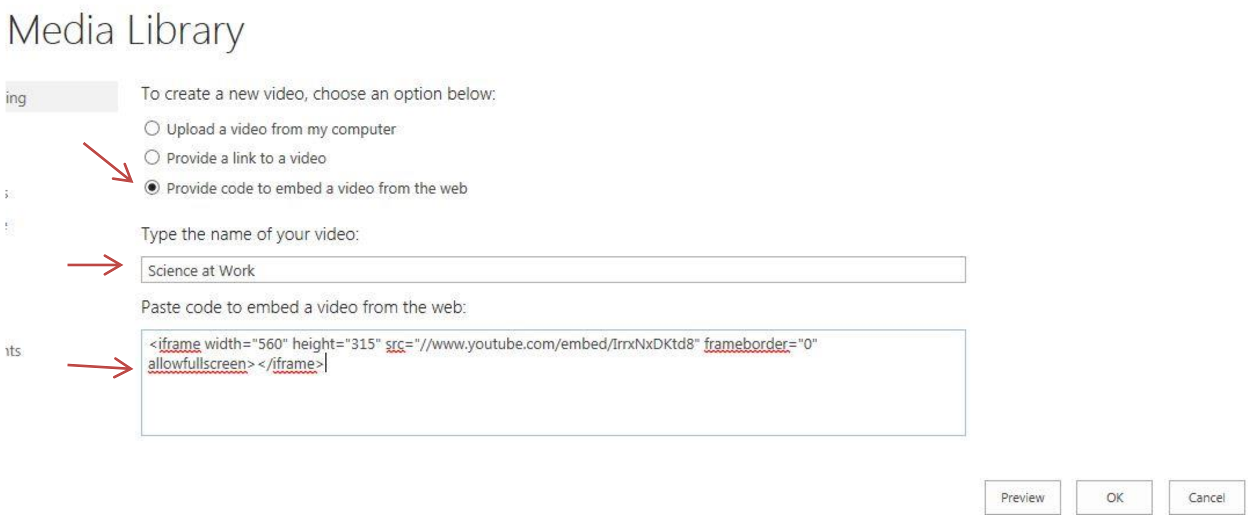
4. Navigate to your Media library on your site by clicking the **Gear icon**, selecting **Site Contents** and then your new site assets library, in this example we named it "**Media Library**."

5. From the Media Library page that appears, click the **Files** tab.

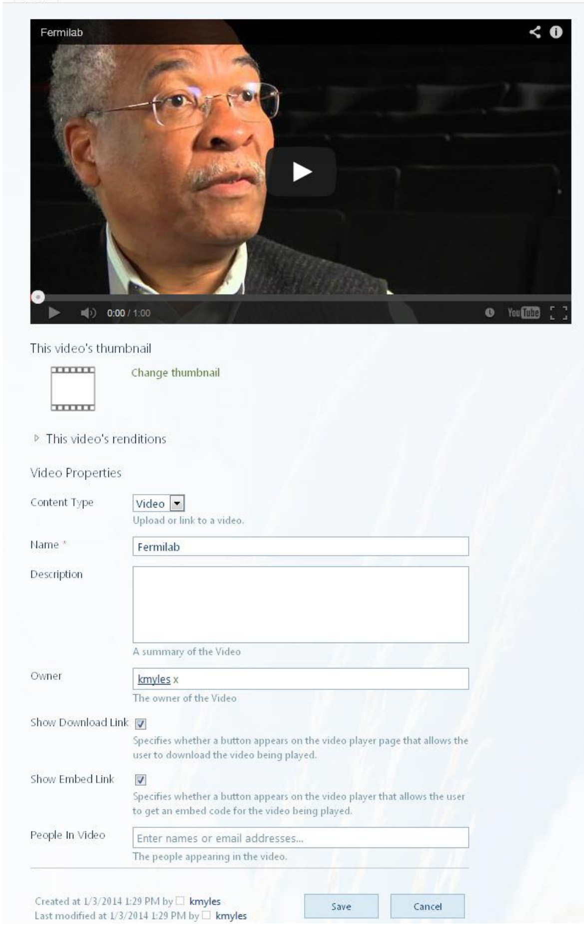
6. Choose the New Document dropdown menu and select **Video**.



7. From the Media Library page that appears, select **Provide code to embed a video from the web** and paste the code into the **Paste code to embed a video from the web** field and add a name for your video and click **OK**.



8. A page will display enabling you to update various fields including one to add the names of the people in the video and a description field to add a summary of the video.



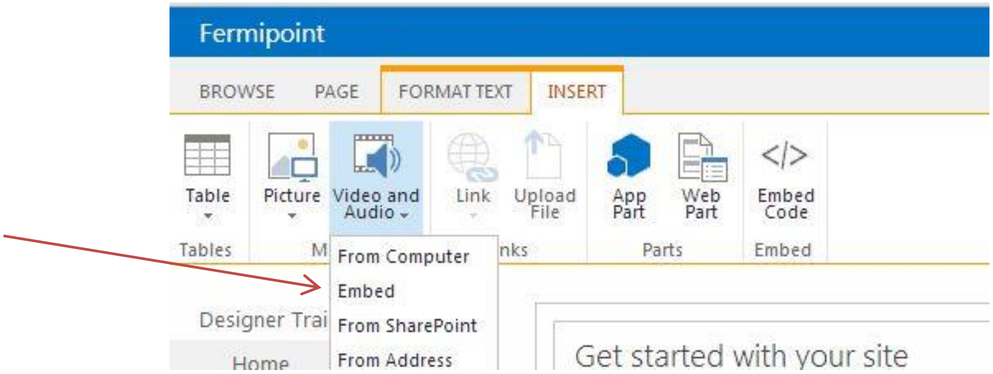
9. Click **Save** to save your changes.

Add the YouTube video to a page

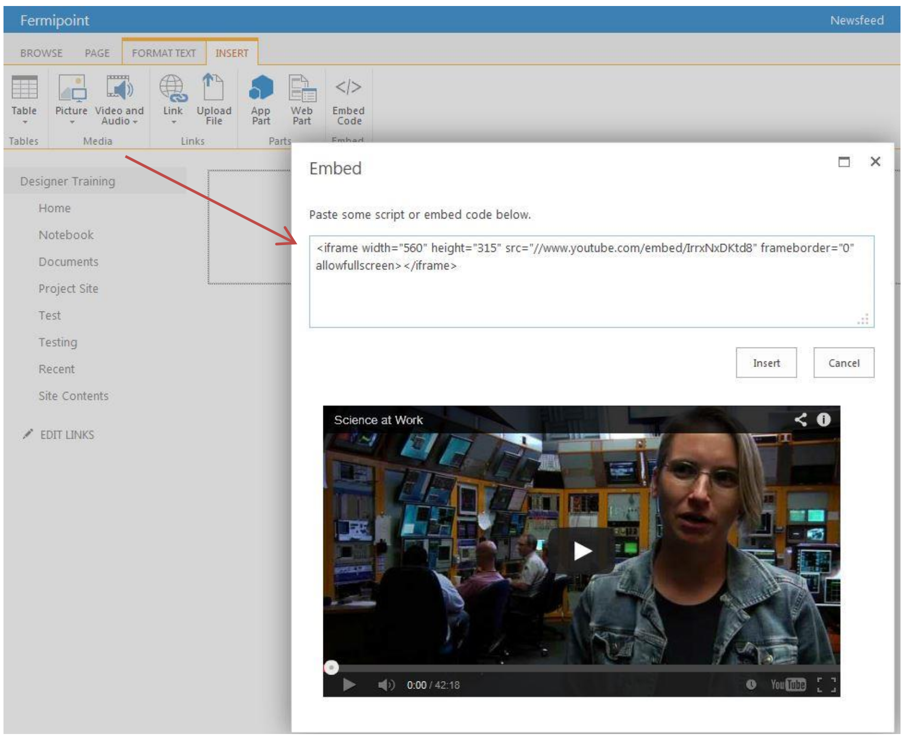
You can add video directly to a page by pasting the embed code for that video or you can save it to the page from your new asset library (in this example it's called the Media Library.)

To add a video to a wiki or Web Part page using an embed code:

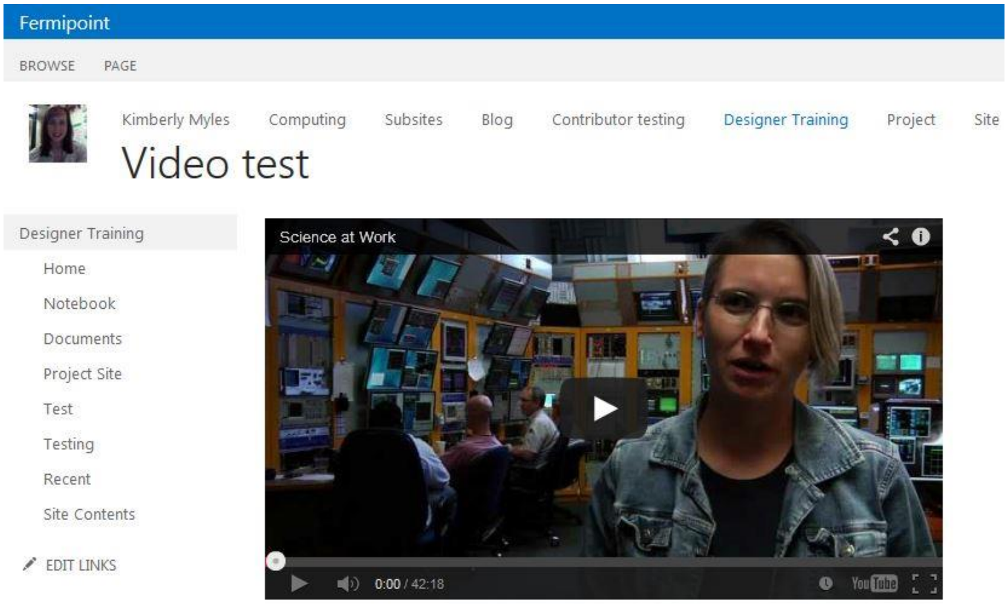
1. Get into page edit mode.
2. From the ribbon, click the **Insert** tab.
3. Click the down arrow on the Video and Audio button and select **Embed**.



4. From the Embed popup window that appears, paste your embed code. A preview will appear in the popup window.

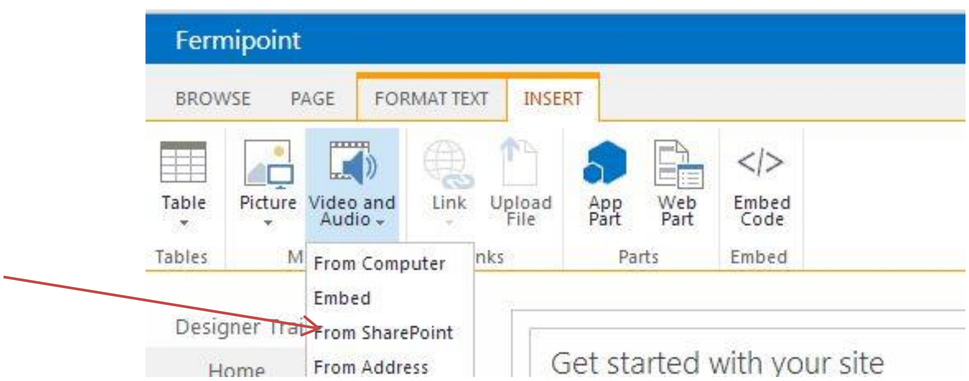


5. Click **Insert** to insert this video on your page.
6. Click the **Page** tab and click **Save** to save the video to the page. Visitors can now click the arrow on the video image to play the video.

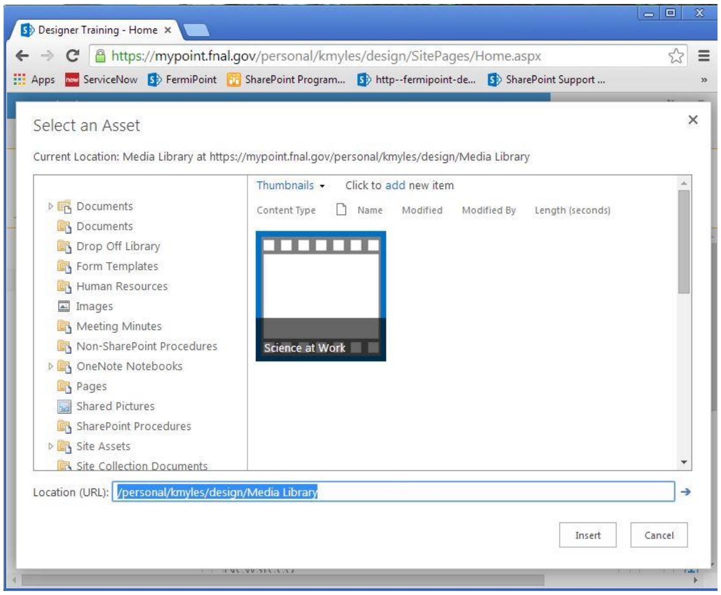


To add video to a wiki or Web Part page from an asset library:

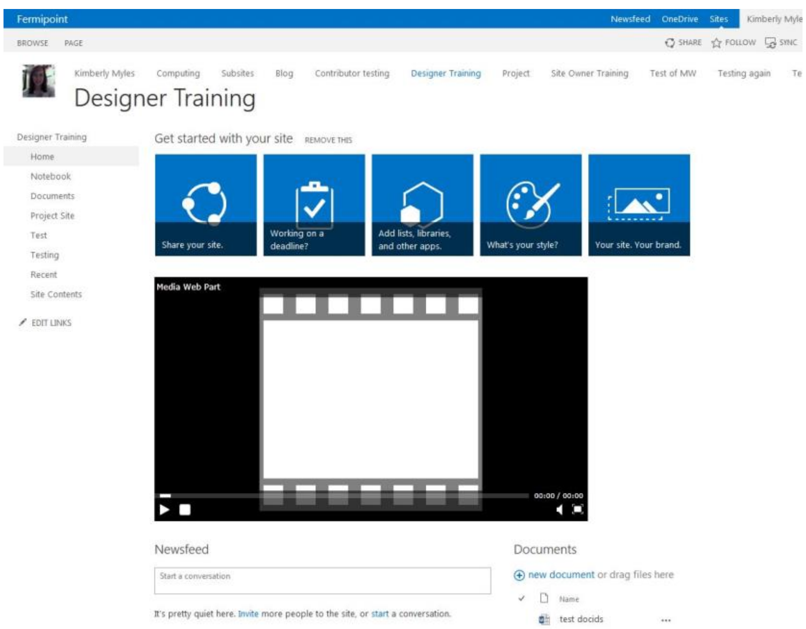
1. Get into page edit mode.
2. From the ribbon, click the **Insert** tab.
3. Click the down arrow on the Video and Audio button and select **From SharePoint**.



4. From the Select an Asset page that appears, click the image you want to include from your asset library (in this example it's titled the Media Library) and click **Insert.**



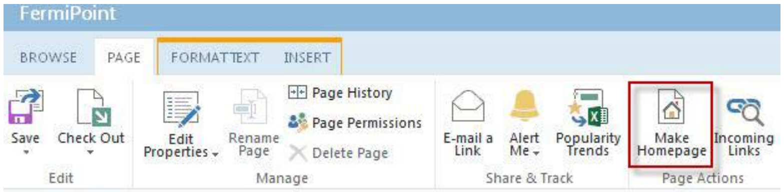
The video you select will automatically appear in a Media Web Part on the page.



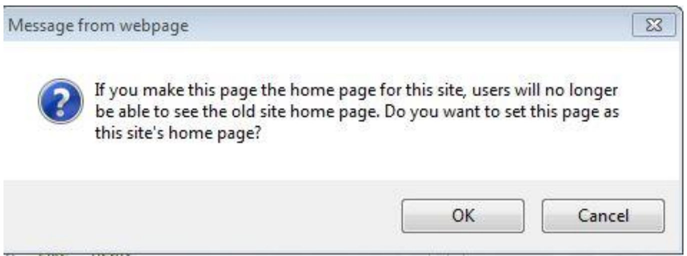
5. Click Save to save changes to your page.

3.7 Make a page the homepage for a site

1. Navigate to the page you want to make the new homepage for your site.
2. Click the **Page** tab.
3. From the ribbon, click **Make Homepage**.



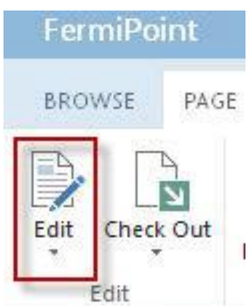
4. A ‘Message from webpage’ dialogue box appears warning you that if you make a new page your home page, users will no longer be able to see the old home page. If you agree, click **OK** to make this change.



3.8 Add lists and libraries to a page

You can display views of lists and libraries on a page so visitors can see important information without having to click through multiple lists or libraries. You can display a list or library on a page by editing the page and then adding the list or library App Part to the page.

1. On the page that you want to add the list (or library) to, click **Edit**.



NOTE: If the **Edit** command is disabled or doesn’t appear, you may not have permission to edit the page.

2. From the ribbon, click the **Insert** tab and select **App Part**.

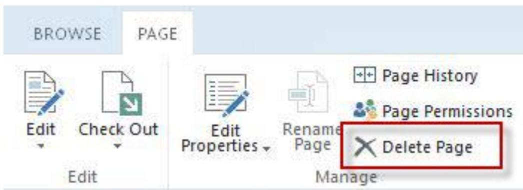
3. Select the App Part for the list or library you want to add and click **Add**.

4. From the ribbon, click **Save** to save your changes.

For more information, see the article *Add, change, or delete a list or library on a page*: http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/add-change-or-delete-a-list-or-library-on-a-page-HA102771941.aspx

3.9 Delete a page

1. Navigate to the page you want to delete and click the **Page** tab.
2. From the ribbon, select **Delete Page**.

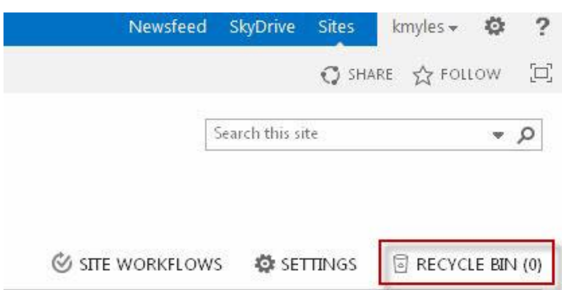


3. A 'Message from webpage' dialogue box will appear asking if you want to send the page to the Recycle Bin. Click **OK**.

NOTE: The page will no longer appear in the Site Pages library.

3.10 Restoring a deleted page from the recycle bin

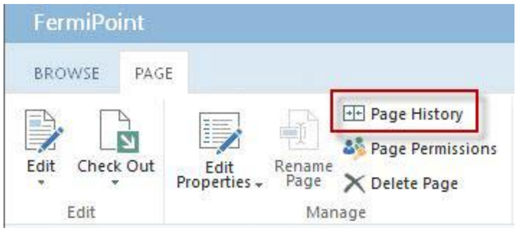
1. Select the gear icon and choose **Site Contents**.
2. From the upper right hand corner of the Site Content page, select the recycle bin.



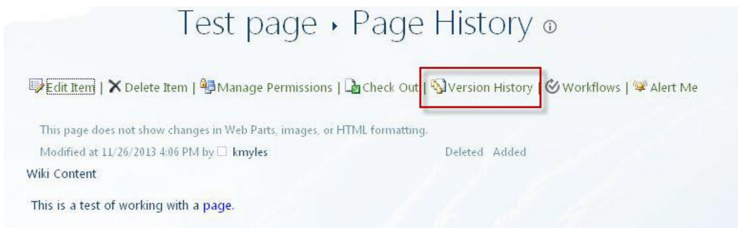
3. Check the box next to the page you want to restore and click **Restore Selection** to restore it.

3.11 Restoring an older version of a page

1. Navigate to the page you want to update and click the **Page** tab.
2. From the ribbon, select the Page History button.

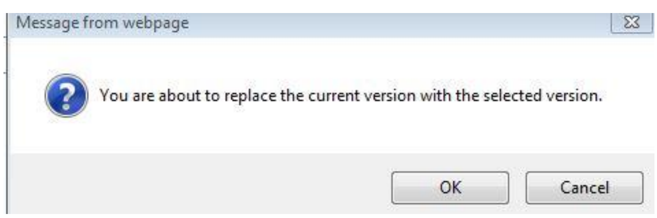


3. From the Page History page that appears, select **Version History**.



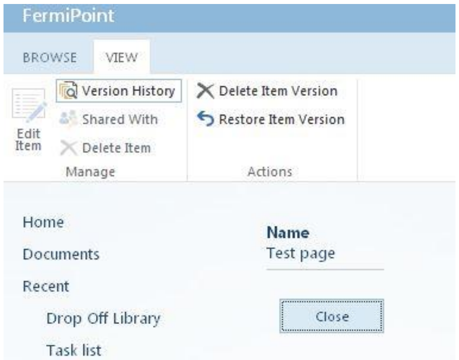
4. Click the Modified date to get a dropdown menu that allows you to view, restore or delete (as long as it's not the current default version) that version of the page.

5. If you choose **Restore**, a 'Message from webpage' dialogue box will appear asking if you want to replace the current version of the page with the selected version. Click **OK** to accept this update.



6. If you choose to **View** the page, the page will appear. From the View tab, you can choose to delete this version by clicking **Delete Item Version** or you can restore it by selecting **Restore Item Version.**
   - If you choose to delete it, a 'Message from webpage' dialogue box will appear asking if you want this version sent to the Recycle bin. If you do, click **OK.**

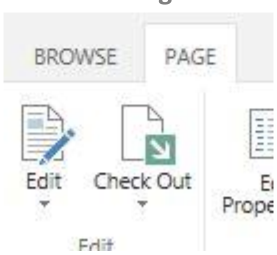
- If you choose to **Restore** this version of the page, a 'Message from webpage' dialogue box will appear asking if you want to replace the current version with the selected version. Click **OK** to accept this change.



3.12 Running spell check on your page

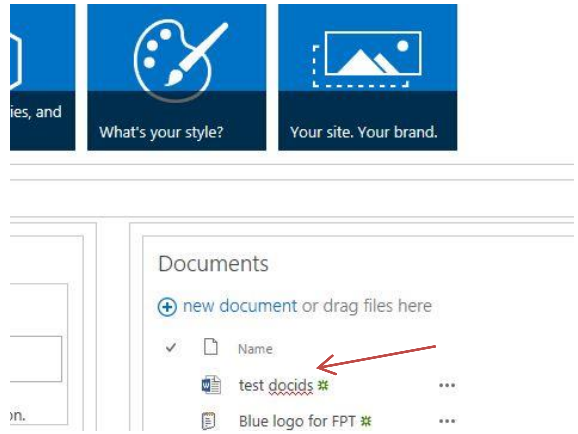
To check the spelling on a page, perform the following:

1. Select the **Page** tab and click **Edit** (or select the **Edit** link from the Top Links bar).



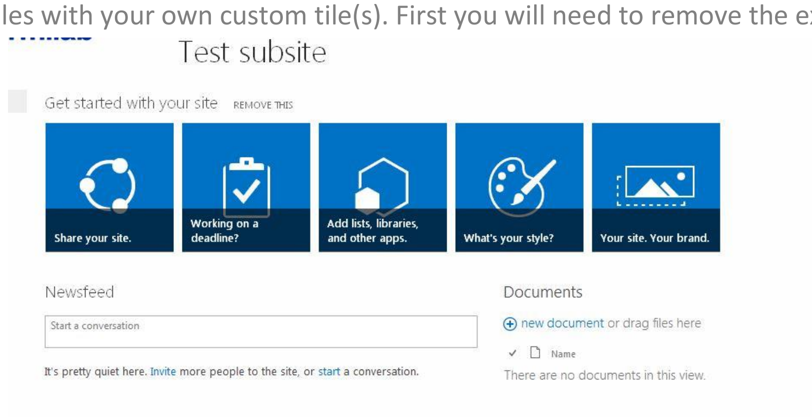
2. From the ribbon, select **Spelling**.

A Spell Check text box will appear indicating if any spelling error(s) are found. The misspelled word will be underlined in red.



3.13 How to add custom tiles to a page (Promoted Links)

Your site comes with an out-of-the-box set of tiles such as "Get started with Your site." You can replace these tiles with your own custom tile(s). First you will need to remove the existing tiles.



To remove existing tiles:

1. Click **Remove this** right above the tiles.

Next, you will need to add a new "Promoted Links" list:

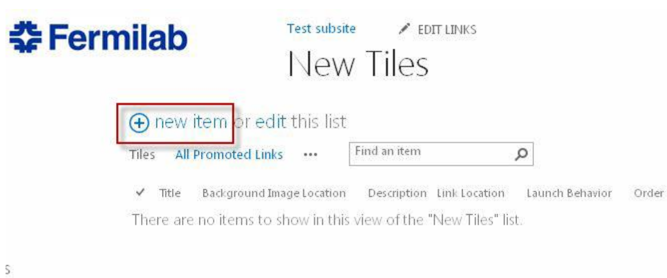
2. Click the gear icon and select **Site Contents**.
3. Select **add an app**.

4. Choose the **Promoted Links** app.

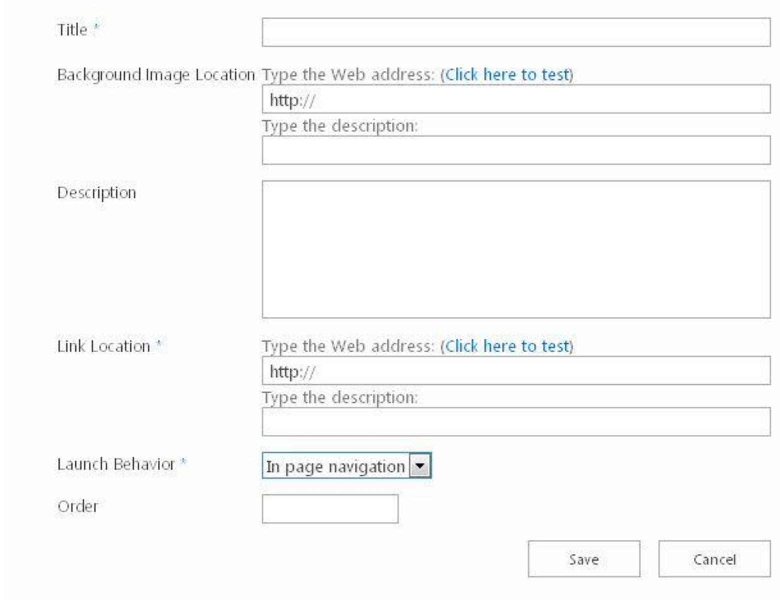
5. Add a name for your Promoted Links app in the Name field.

6. From the Site Contents page, open the new list you created by clicking it.
7. From the New Tiles page that appears, click **All Promoted Links** link.

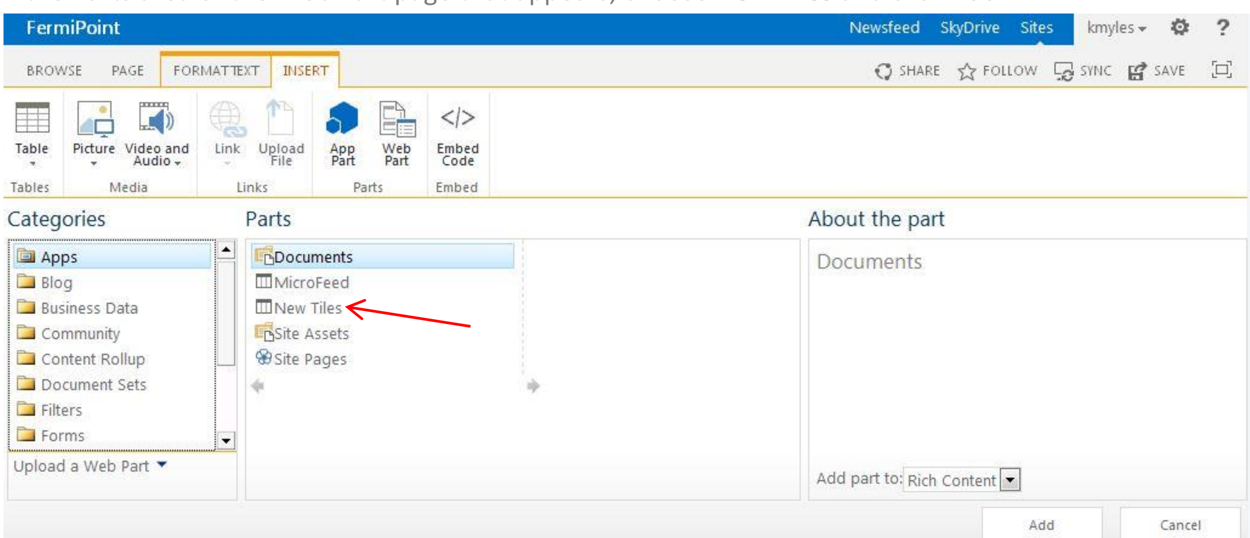
8. In the All Promoted Links view of the New Tiles page that appears, click **new item**.



9. From the form that appears fill out the following:
   - A title for your link.
   - Add a Web address and description for your link's background image (Upload and save an image to your SharePoint Asset library and copy the link to this location and paste it in this field.)
   - Add a Web Address and description for a Link Location to point to.
   - From the Launch Behavior dropdown menu, you can select from **In page navigation; Dialog**; or **New Tab.**
   - You can set the order your link(s) will appear in by entering a number in the Order field.

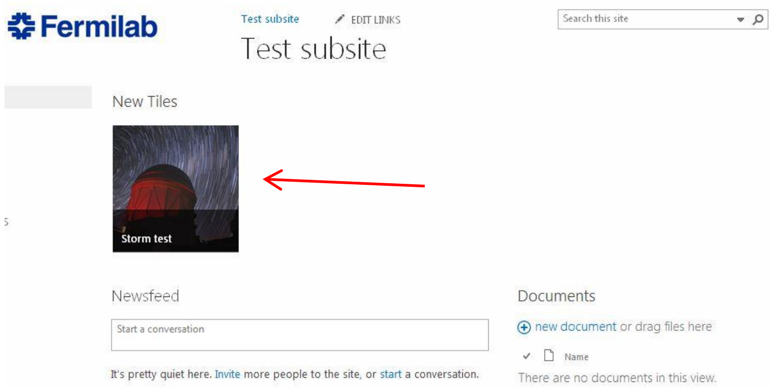


10. Click **Save** to save your changes.
11. Navigate to the page you want to add the new links to and get into edit mode (click the **Edit** link from the Top Link Bar). Click the **Insert** tab and select **Web Part**.
12. From the Parts area of the Web Part page that appears, choose **New Tiles** and click **Add**.



13. From the ribbon click **Save**.

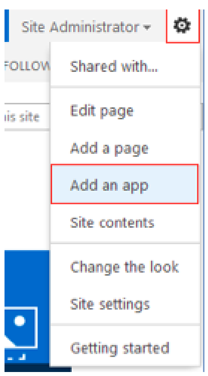
Your new tile (link) will now appear on your page. If you click it, it will open to the link you added in the form.



4.0 Working with Lists

4.1 Create a list

1. Click the gear icon and choose **Add an app** from the dropdown menu.

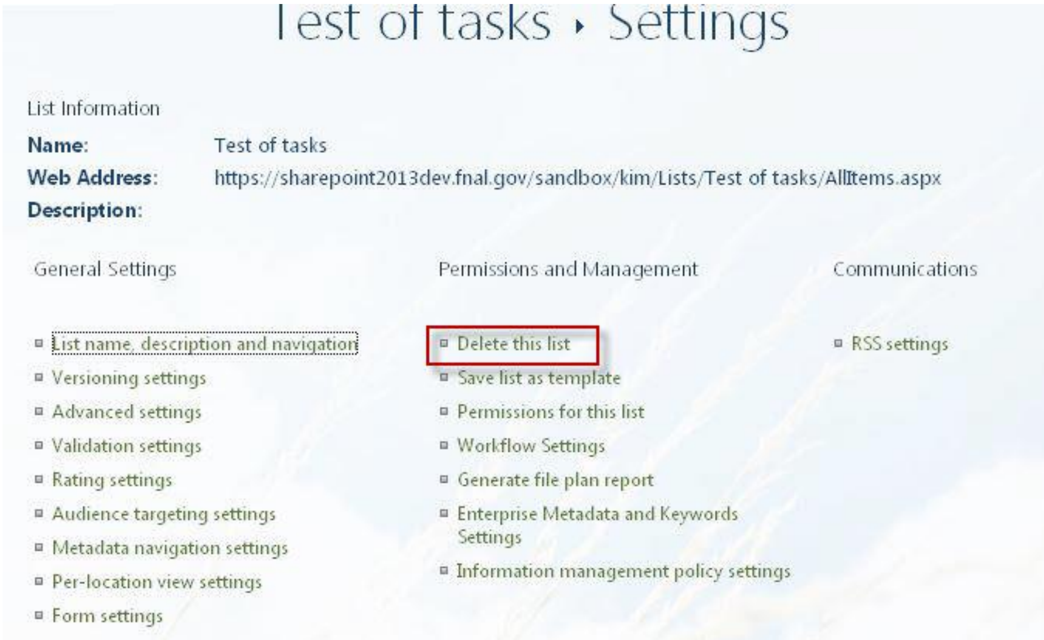


2. Choose from the list of available 'List apps.' For example: Custom List, Tasks, Calendar etc.

3. Choose a name for your new list and click **Create** to create it.

4.2 Delete a list

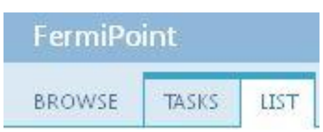
1. Click the gear icon and select **Site Contents**.
2. Double click on the List you want to delete.
3. From the page that appears, select the **List** tab.
4. From the ribbon, select **List Settings**.
5. From the Settings page, in the Permissions and Management area, select **Delete this list**.



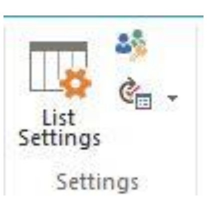
6. A 'Message from webpage' dialogue box will appear asking if you are sure you want to delete the list and send it to the Recycle bin. Click **OK**.

4.3 Change the title for a list

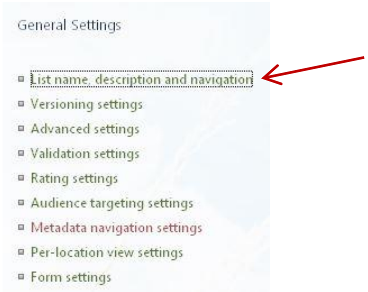
1. Navigate to the list you want to update. (Gear icon, Site Contents, select the list.)
2. Select the **List** tab.



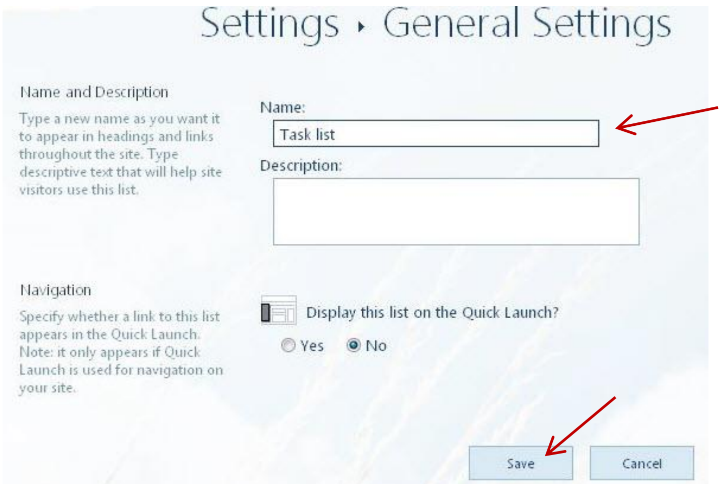
3. From the ribbon, select **List settings**.



4. From the General Settings area of the Settings page, select **List name, description and navigation.**



5. From the General Settings page that appears, update the Name field and click **Save** to save your changes.



4.4 Create a custom list

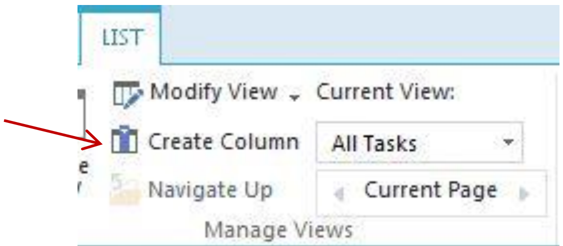
1. Click the gear icon and choose **Add an app** from the dropdown menu.
2. Select the **Custom List** option.

3. From the 'Adding Custom List' form that appears, name your new list and click **Create**.

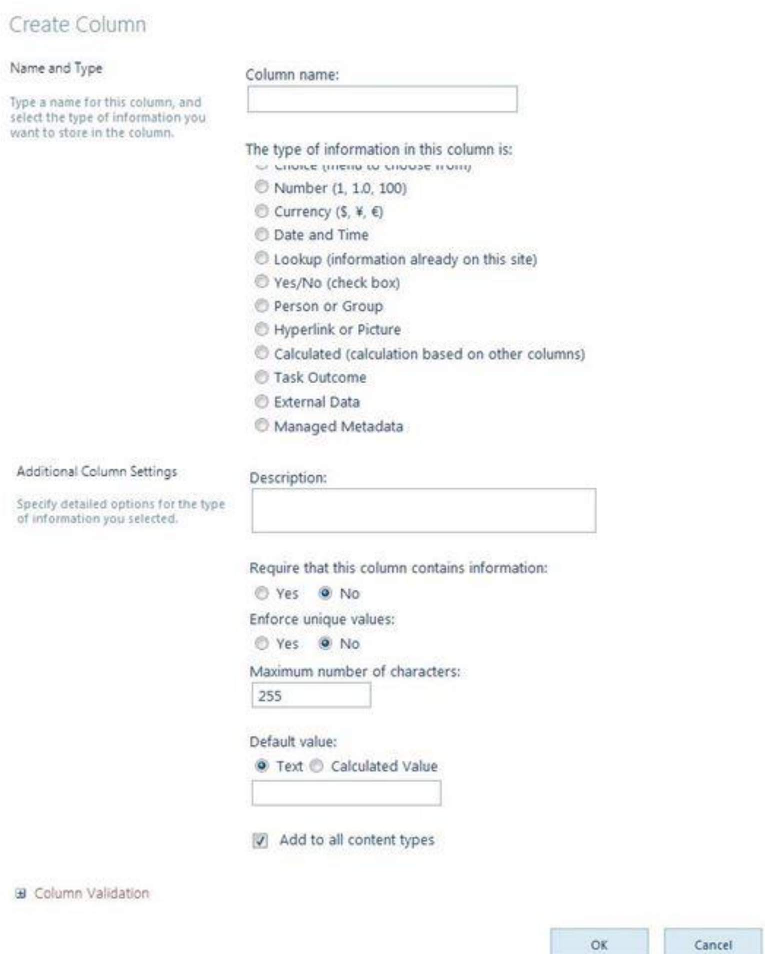
NOTE: You will need to create new columns to build out your list.

4.5 Add a column

1. Navigate to the list (or Library) you want to update.
2. Click the **List** (or Library) tab.
3. From the ribbon, click **Create Column**.



4. Fill out the form that appears and click **OK** to save your changes:
   - In the Name and Type area, enter the name that you want for the column and add it to the **Column name** box.
   - Under 'The type of information in this column is' area, select the type of information you want to appear in the column i.e. yes or no response, choice column number, hyperlink etc.



4.6 Delete a column

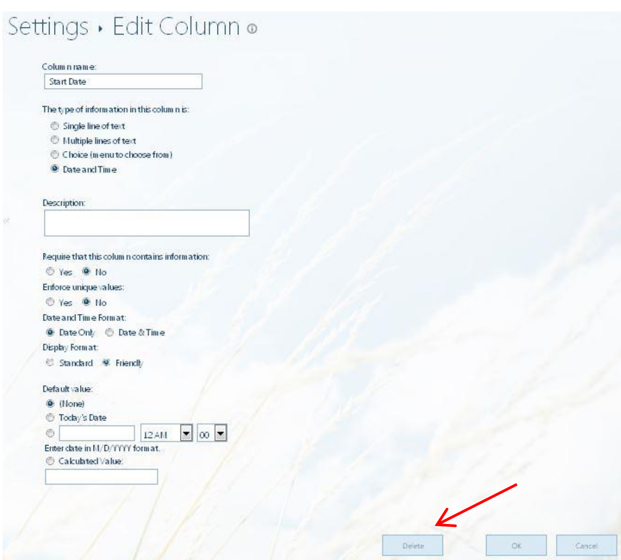
Important: If you delete a column, you also delete any data in the column. Once you delete a column, you cannot restore the column from the Recycle Bin.

1. Navigate to the list or library that you want to delete a column from.
2. From the ribbon, click the **List** (or **Library)** tab.

NOTE: The name of the tab may vary depending on the type of list or library. For example, if your list is a calendar, the name of the tab is Calendar.

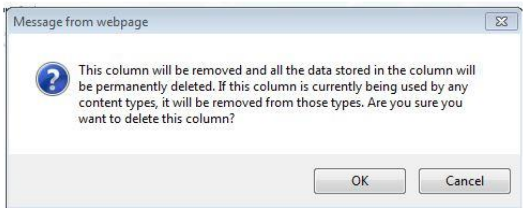
3. From the ribbon, click **List Settings** (or **Library Settings**).
4. On the **List Settings** (or **Library Settings)** page, in the Columns section, click the name of the column that you want to delete.

5. From the Edit Column page that appears, scroll to the bottom of the page and then click **Delete**.



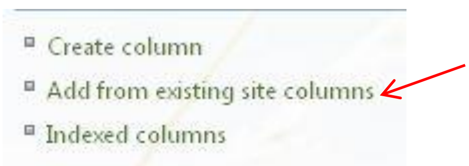
7. A ‘Message from webpage’ dialogue box will appear asking if you are sure you want to delete the list and send it to the Recycle bin. Click **OK**.

Note: Lists and libraries contain required columns that can’t be deleted, such as the **Title** or **Name**. If the column can’t be deleted, the **Delete** button is not available. If you can’t delete a column, but you don’t want the column to appear in a view, you can remove it from the view. (See section 4.0 Working with Views for more information…)

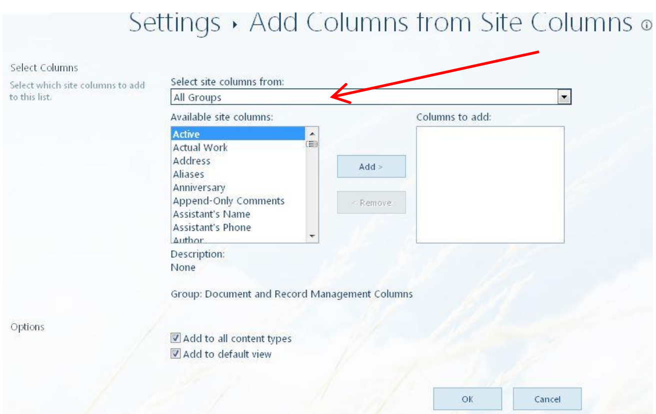


4.7 Add a site column to a list or library

1. Navigate to the list (or library) that you want to add a site column to.
2. From the ribbon, click the **List** (or **Library)** tab.
3. From the ribbon, click **List Settings** (or **Library Settings**).
4. On the Settings page, in the Columns section, click Add from existing site columns.

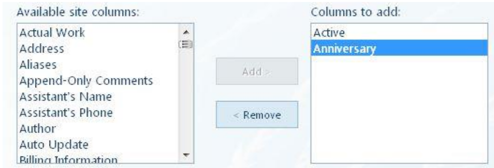


5. On the Add Columns from Site Columns page that appears, in the Select Columns section, select the group of site columns to choose from in the ‘Select site columns from’ drop-down list.



When you select a column group from the list, the available site columns appear in the **Available site columns** list.

6. Select the site columns you want to add and click **Add**.



7. To add the column to the default view, which people on your site automatically see when they first open a list (or library) make sure **Add to default view** is selected. Some lists such as the Tasks list also have the option **Add to all content types**, which is selected by default. If you want to add the column to all content types, make sure **Add to all content types** remains selected.

NOTE: Depending on the type list or library, there may be more settings in the Options section. Select the additional options that you want.

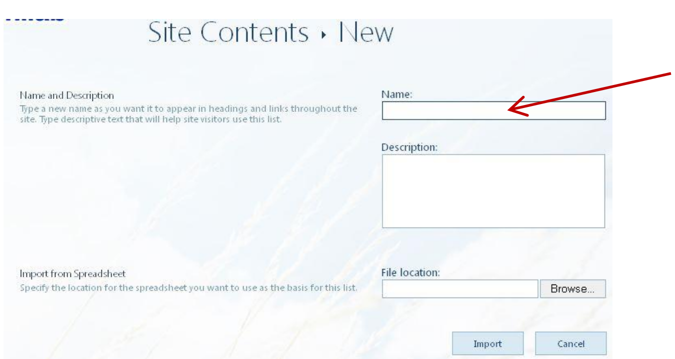
8. Click **OK**.

4.8 Import a spreadsheet to create a list

NOTE: Before you import a spreadsheet, make sure that it doesn't have blank columns, rows missing data, missing headers or contains formulas.

1. Click the gear icon and choose **Add an app** from the dropdown menu.
2. Select the **Import Spreadsheet App** from the list of apps.

3. From the New form that appears:
   - Enter a name for your app (Try to keep names short and eliminate spaces.)



- Click the Browse button to browse to your spreadsheet, select it and click **Import** to import it.

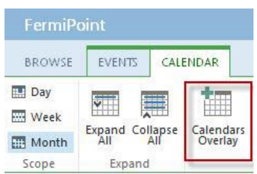
NOTE: a dialogue box appears that asks how your range should be designated. Select **Range of Cells** and then click your spreadsheet and highlight the desired cells.

4. Click the **Import** button to import your spreadsheet.

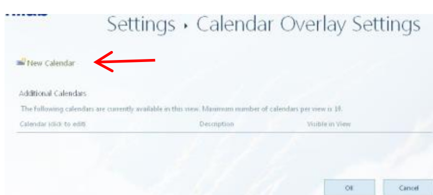
4.9 Overlay multiple calendars

1. Navigate to the calendar you want to update and select the **Calendar** tab.

2. From the ribbon, click **Calendar Overlay**.

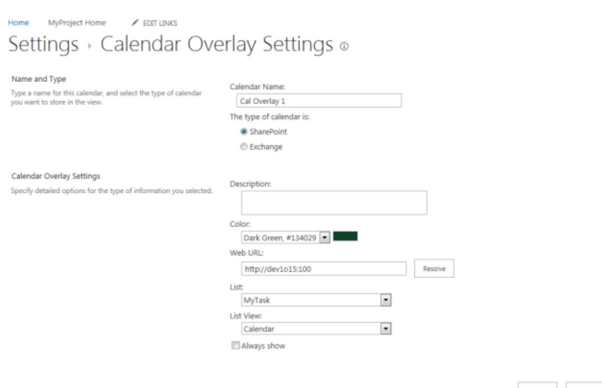


3. The Calendar Overlay Settings page appears. Click **New Calendar** to add a new calendar to overlay.



4. Select the Calendar Name for the new calendar and add information such as the color you want to assign to it, the Web URL for the calendar list and the list type and click **OK** to save your changes.

   Repeat these steps until you have all the calendars you want to overlay added.



NOTE: SharePoint allows a maximum of 10 calendars per view in Calendar Overlay

5.0 Working with views

You can create a view of a list or library to see content in the order that you prefer by creating a personal view or by sharing that view and making it available to all visitors to your site.

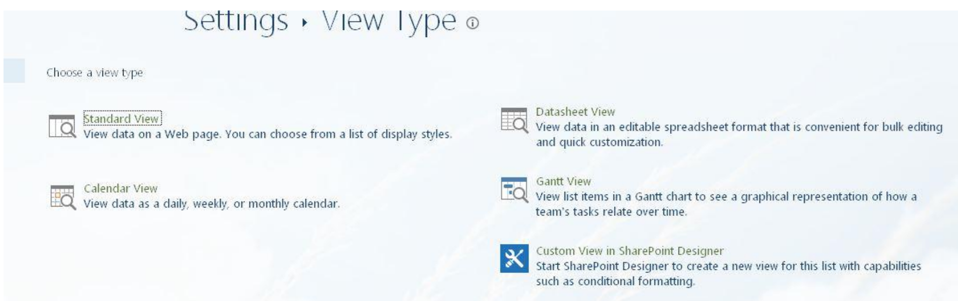
Read more about views in the following article: *Create, change, or delete a view of a list or library:*

http://office.microsoft.com/en-us/sharepoint-server-help/create-change-or-delete-a-view-of-a-list-or-library-HA102774516.aspx

5.1 Create a view

1. Navigate to the list (or library) where you want to create a view, click the **List** (or Library) tab, and then click **Create View**.

2. Choose a view type, such as **Standard View**, **Gantt View** or a **Custom View created in SharePoint Designer**.



3. From the Create View page that appears, fill out the following fields:
   - In the View Name field, type the name for your view.
   - Select **Make this the default view** if you want to make this the default view for the list (or library).

   NOTE: Only a public view can be the default view for a list or library.

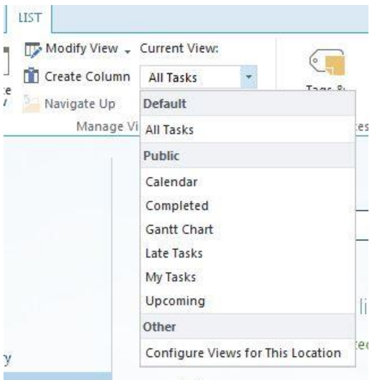
   - In the Audience section, under View Audience, select **Create a Personal view** or **Create a Public view**.
   - In the Columns section, select the columns that you want in the view and clear the columns that you don't want to appear. Next to the column numbers, select the order that you want to columns to appear in the view.
4. Configure the other settings for your view, such as Sort and Filter, and click **OK**.


Settings › Edit View
OK
Cancel
Name
Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.
View Name:
All Tasks
Web address of this view:
https://sharepoint2013dev.fnal.gov/sandbox/kim/Lists/Task list/
AllItems .aspx
This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.
Columns
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.
Display
Column Name
Position from Left
Completed 1
Task Name (linked to item with edit menu) 2
Due Date 3
Assigned To 4
% Complete 5
App Created By 6
App Modified By 7
Attachments 8
Content Type 9
Created 10
Created By 11
Description 12
Edit (link to edit item) 13
Folder Child Count 14
ID 15
Item Child Count 16
Modified 17
Modified By 18
Predecessors 19
Priority 20
Related Items 21
Start Date 22
Task Name 23
Task Name (linked to item) 24
Task Status 25
Type (icon linked to document) 26
Version 27
Sort
Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.
First sort by the column:
None
Show items in ascending order
(A, B, C, or 1, 2, 3)
Show items in descending order
(C, B, A, or 3, 2, 1)
Then sort by the column:
None
Show items in ascending order
(A, B, C, or 1, 2, 3)
Show items in descending order
(C, B, A, or 3, 2, 1)
Sort only by specified criteria (folders may not appear before items).
Filter
Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering items.
Show all items in this view
Show items only when the following is true:
Show the items when column
None
is equal to
And
Or
When column
None
is equal to
Show More Columns...
Tabular View
Group By
Totals
Style
Folders
Item Limit
Mobile
Adjust mobile settings for this view.
Enable this view for mobile access
(Applies to public views only)
Make this view the default view for mobile access
(Applies to public views only)
Number of items to display in list view web part for this view:
3
Field to display in mobile list simple view:
Completed
Web address for this mobile view:
https://sharepoint2013dev.fnal.gov/sandbox/kim/_layouts/15/mobile/viewa.aspx?List=f7874637%2D36af%2D4a32%2Daf98%2D8aa576cfaab0&View=0bb0fdca%2Dcd7e%2D4809%2D96d1%2D84f88777e3b7
OK
Cancel

5.2 Modify an existing view

Use the following steps to change a view, such as making it the default view, adding or removing columns, and changing the sort order of items in the view.

1. From the list (or library) where you want to change a view, click the **List** (or **Library)** tab.
2. Select the view you want to change from the Current View drop-down list.



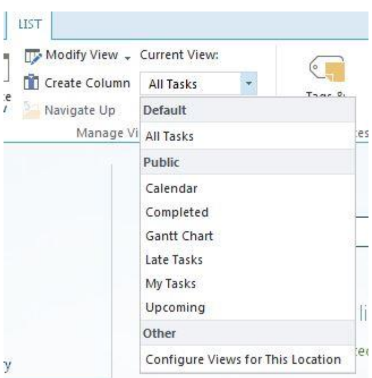
3. Click **Modify View**.

NOTE: If Modify View is disabled, you don't have the permissions to modify the current view. You can, however, modify your personal views.

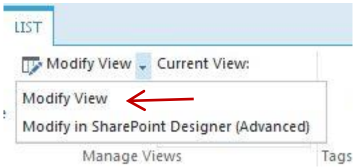
5.3 Delete a view

NOTE: If Delete is not an option, this may be the default view for a list or library. You must first modify another view and make it the default.

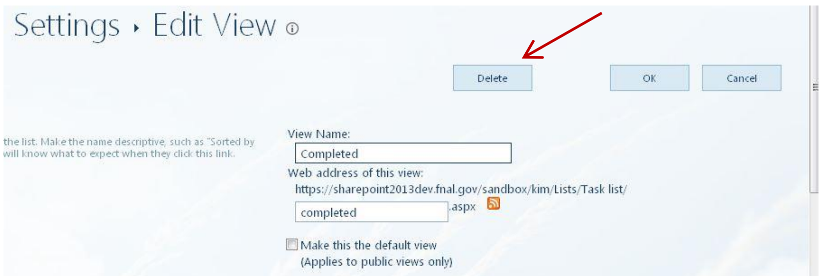
1. In the list (or library) where you want to delete a view, click the **List** (or Library) tab.
2. Select the view you want to delete from Current View drop-down list.



3. Click **Modify View**.



4. In the top area of the view, click **Delete**.



5. A ‘Message from webpage’ dialogue box will appear asking if you are sure you want to delete this view. Click **OK**.

6.0 Create a document library

6.1 Create a Library (Document, asset, picture etc.)

A SharePoint library allows contributors to create, store, update, and collaborate on files with team members. Each type of library — document, picture, form, wiki page, asset, report, record, data connections, and slide — displays a list of files and key information about the files, such as who was the last person to modify the file, which helps contributors to use the files to work together.

Types of Libraries available:

Asset library: To share and manage digital media assets, such as image, audio and video files, use an asset library. An asset library makes it easier for users to discover and reuse digital media files that others have already created, such as logos and corporate images. An asset library also provides content types with properties and views for managing and browsing media assets, such as thumbnails and metadata keywords. For example, you may want to manage and store branded images and reusable content fragments from applications so they are available throughout your enterprise and consistently used.

Data Connections library: To simplify the maintenance and management of data connections, use a data connection library. A data connection library is a centralized place to store Office Data Connection (ODC) files. Each of these files (.odc) contains information about how to locate, log on, query, and access an external data source. Centralizing ODC files in a data connection library also makes it possible to share, manage, and search data connection files from within a SharePoint site, and helps ensure that business data and reports, especially spreadsheets, maintain a consistent set of values and formula results as "one version of the truth".

Document library: For many file types, including documents and spreadsheets, use a document library. You can store other kinds of files in a document library, although some file types are blocked for security reasons. When you work with programs that are not blocked, you can create those files from the library. For example, your marketing team may have its own document library for planning materials, news releases, and publications.

Form library: If you need to manage a group of XML-based business forms, use a form library. For example, your organization may want to use a form library for expense reports. Setting up a form library requires an XML editor or XML form design program, such as Microsoft InfoPath. The form that people fill out is just an .xml file that contains the data (and only the data) that was entered into the form, such as the expense date and the amount. Everything else that makes up the expense report is provided by the form template. After people fill out forms, you can merge the form data or export it for analysis.

Picture library: To share a collection of digital pictures or graphics, use a picture library. Although pictures can be stored in other types of SharePoint libraries, picture libraries have several advantages. For example, from a picture library you can view pictures in a slide show, download pictures to your computer, and edit pictures with compatible graphics programs, such as Microsoft Paint. Consider creating a picture library if you want to store pictures of team events or product launches. You can also link to pictures in your library from elsewhere on your site, such as from wikis, and blogs.

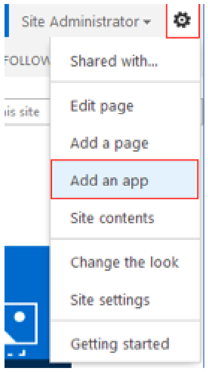
Record library: To keep a central repository for storing and managing your organization's records or important business documents, use a record library. For example, your organization may need to adhere to compliance regulations which require an organized process for managing pertinent documents. A Records Center site can contain a number of record libraries for storing different types of records. For each library you can set policies that determine what records to store, how to route and manage the documents, and how long these records must be retained.

Report library: To simplify the creation, management and delivery of web pages, documents and key performance indicators (KPI) of metrics and goals, use a report library. The report library is a central place where you can create and save reports, such as Excel workbooks, and dashboard pages. When you publish an Excel workbook to a reports library, it is single-click enabled to open in browser view, which is a convenient way to see the workbook without adding it to a Web Parts page.

Wiki Page Library: To create a collection of connected wiki pages, use a wiki page library. A wiki enables multiple people to gather information in a format that is easy to create and modify. You can also add wiki pages that contain pictures, tables, hyperlinks, and internal links, to your library. For example, if your team creates a wiki site for a project, the site can store tips and tricks in a series of pages that connect to each other.

To create a library:

1. Click the **gear icon** and choose **Add an app** from the dropdown menu.



2. Choose from the list of available “Library apps.”
3. Choose a name for your new list and click **Create** to create it.

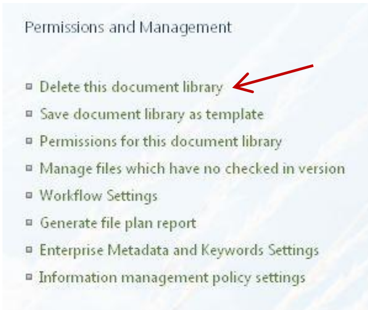
6.2 Edit a library title

1. Navigate to the library you want to update the title for and select the **Library** tab.
2. From the Ribbon, select the **Library settings** button.
3. From the Settings page that appears in the General Settings area, click **List name, description and navigation**.

4. From the General Settings page that appears, update the Name field and click **Save** to save your changes.

6.3 Delete a document library

1. Navigate to the library you want to delete and select the **Library** tab.
2. From the Ribbon, select the **Library settings** button.
3. From the Settings page in the Permissions and Management area, select **Delete this library**.



4. A ‘Message from webpage’ dialogue box will appear asking if you are sure you want to delete this document library. Click **OK**.

6.4 Create a site column

Site columns are fields that can be re-used across sites and sub-sites when you create lists or libraries. There is an extensive list of out-of-the-box built-in site columns that can be used by contributors to create and manage their content. (I.e. Base columns, core contact and calendar…)

1. Navigate to the site you want to add a site column to.
2. Click the gear icon and choose **Site Settings** from the dropdown menu.
3. From the Web Designer Galleries area, select **Site Columns**.
4. From the Site Columns page that appears, click **Create** to create a new site column.
5. In the form that appears, add the following:
   - A name for your column in the **Column Name** field and select a **Column type**.
   - Select an existing group or create a new site column group.

6.5 Add a Site Column to a document library

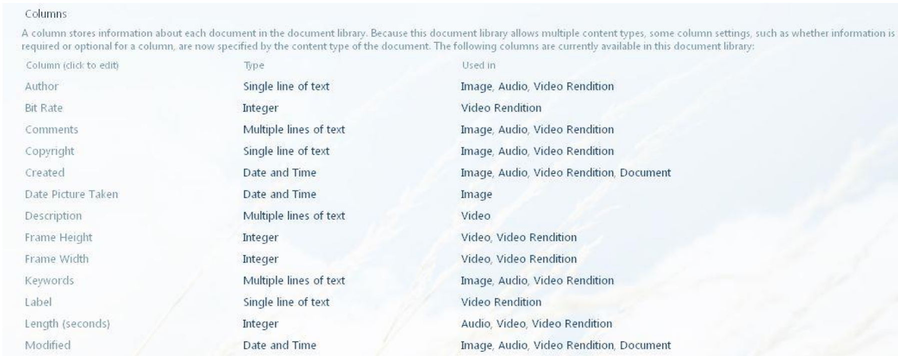
1. From the Library you want to update, click the **Library** tab and from the ribbon select **Library Settings**.
2. From the Library settings page select **Add from existing site columns**.
3. Select **Group** to view site columns of the group.
4. Click **Add** to select a column and then click **OK** to add that column to your document library.

6.6 Change the existing column type of a library

You can change the settings for a column, such as the name of the column.

1. Navigate to the library you want to update the title for and select the **Library** tab.
2. From the Ribbon, select the **Library (or List) settings** button.
3. Click **Library** (or List) Settings.

4. From the Library (or List) Settings page, in the Columns area, click the name of the column that you want to change.


Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	Used in
Author	Single line of text	Image, Audio, Video Rendition
Bit Rate	Integer	Video Rendition
Comments	Multiple lines of text	Image, Audio, Video Rendition
Copyright	Single line of text	Image, Audio, Video Rendition
Created	Date and Time	Image, Audio, Video Rendition, Document
Date Picture Taken	Date and Time	Image
Description	Multiple lines of text	Video
Frame Height	Integer	Video, Video Rendition
Frame Width	Integer	Video, Video Rendition
Keywords	Multiple lines of text	Image, Audio, Video Rendition
Label	Single line of text	Video Rendition
Length (seconds)	Integer	Audio, Video, Video Rendition
Modified	Date and Time	Image, Audio, Video Rendition, Document

5. Make updates to the settings and click **OK**.

6.7 Grant access to a library

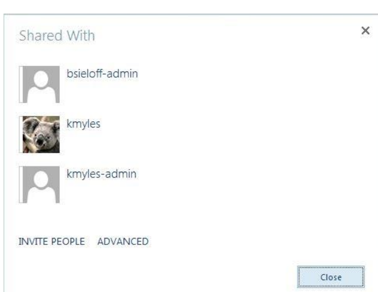
In some cases, your site might contain content only meant for certain users or groups. For example, you might create a new library for a special project, and want to ensure that only people who work on that project can access the library.

To restrict access, you have to first break permissions inheritance, and then change the permissions for the list or library.

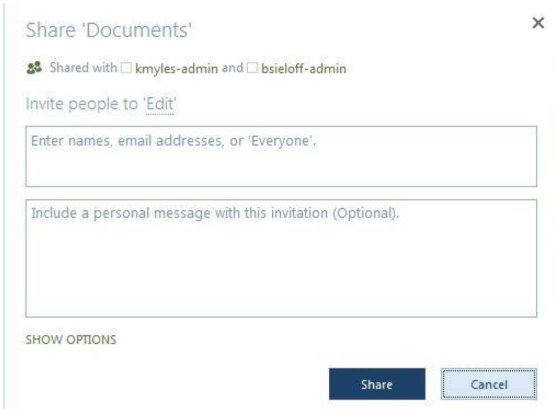
To grant permissions to a SharePoint group (or user) to a list or library:

1. Navigate to the library you want to grant access to and select the **Library** tab.
2. On the ribbon, select **Shared With.**

3. From the **Shared With** window that appears, click **Invite People**.



4. In the **Share '*Name of List or Library*'** dialog box, enter the names of the people or groups that you want to give access.



5. After you add names, you can click **Show Options** to see these options:
    - You can check **Send an email invitation**, and include a personal message.
    - You can specify the permission level that you want the new users to have.
6. When you finish, click **Share**.

6.8 Require the check-out of files

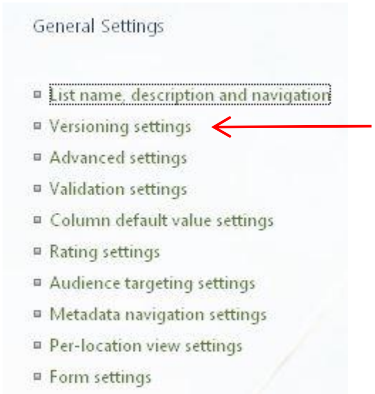
Some groups may want to require users to check out documents before they can edit them. Checking out files prevents users from editing files simultaneously and lets users add check-in comments to clarify version history when versioning is turned on for the library.

NOTE: If you require checking out of documents for your library, make sure that you don't need co-authoring. Co-authoring is a feature that allows multiple people to edit a document at the same time without overwriting each other's changes. Co-authoring won't work if check-out is required. For more information about co-authoring see the following *Document collaboration and co-authoring* article:

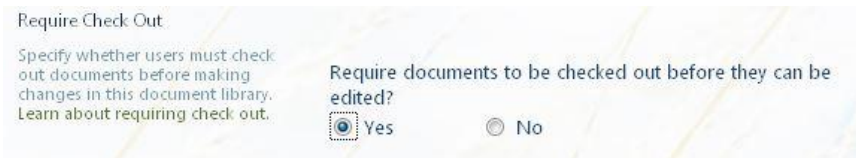
http://office.microsoft.com/en-us/sharepoint-server-help/document-collaboration-and-co-authoring-HA102772333.aspx?CTT=5&origin=HA103455685

To require check-out of files:

1. Navigate to the library you want to require documents to be checked out from and select the **Library** tab.
2. From the Ribbon, select the **Library settings** button.
3. From the Library Settings page, under General Settings area, click **Versioning settings**.



4. From the Versioning Settings page that appears, in the Require Check Out section, for the ‘Require documents to be checked out before they can be edited?’ question, select **Yes**.



5. Click **OK** to save your changes.

6.9 Enable and configure versioning in a library

1. Navigate to the library you want to require versioning for and select the **Library** tab.
2. From the Ribbon, select the **Library settings** button.
3. From the Library Settings page, under General Settings, click **Versioning settings**.
4. From the Content Approval section, for the ‘Require content approval for submitted items?’ question, select **Yes**.

5. In the Document Version History section, select either **Create major versions** or **Create major and minor (draft) versions**.

6. Optional: Select the number of versions you want to retain in the list.

7. Determine which users should be allowed to see drafts of items that have not been approved. This option is only available when 'Require content approval for submitted items' is set to **Yes**. In the Draft Item Security section, select one of the following:
    - Any user who can read items. This selection allows access to anyone who has Read permissions to the site.
    - Only users who can edit items. This selection restricts the view of drafts to those who have permissions to edit.
    - Only users who can approve items (and the author of the item). This selection restricts the view to only the original author of the item and those who have permissions to approve items in the list.

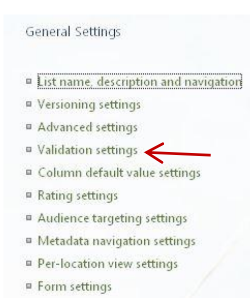
8. If you want users to check out documents before they can make any changes to the library, then in the Require checkout section, click **Yes**.

Note: The Require checkout section appears only for a library.

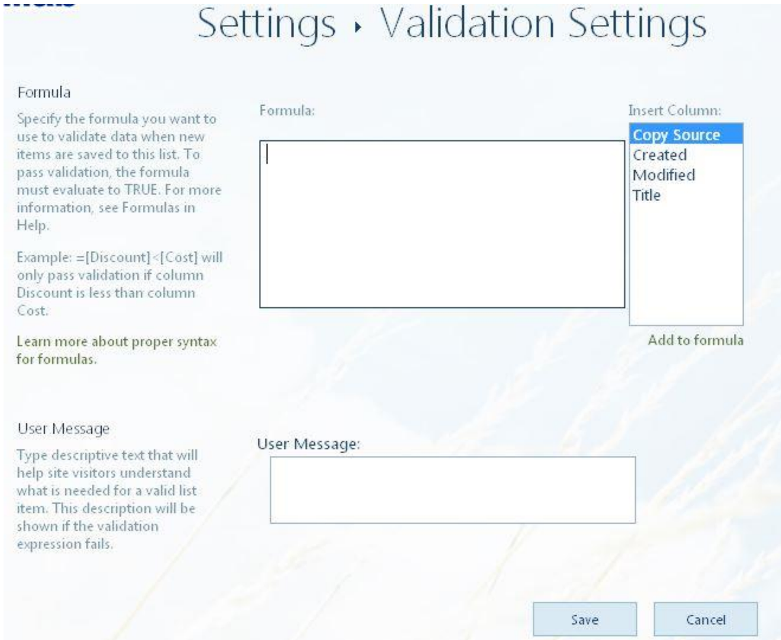
9. Click **OK** to save your changes.

6.10 Set validation settings for a library

1. Navigate to the library you want to manage validation settings for.
2. Click the **Library** tab and select the **Library Settings** button.
3. Select the **Validation Settings** link.



4. From the Validation Settings page that appears, you can define a formula that will be triggered when the user tries to save a new item in the list or library. Click **Save t**o save these changes.



6.11 Enable ratings for a library

In order to allow library visitors and contributors to rate library items, and to encourage interaction, ratings must be turned on for the library:

1. Navigate to the library you want to set up ratings for.
2. Click the **Library** tab and select the **Library Settings** button.
3. From the General Settings page, click **Rating Settings**.

4. Under ‘Allow items in this list be rated?’area, click **Yes**.

Perform either of the following:

- Click **Likes** to let site visitors indicate that they like a document or other list item. NOTE: The total number of Likes will be displayed next to the item and, if a visitor hovers, who has liked them is displayed for that item.
- Click **Star Ratings** to let site visitors rate items with 1 to 5 stars, star ratings of multiple visitor responses will automatically and the result will be displayed next to the item.

7.0 Web Parts

7.1 The Project Summary WebPart and timeline

The Project Summary Web Part provides a high-level view of the events and tasks involved in a project. By default, it is included on the Home page for a project site. It can also be added to any other site that includes a task list.

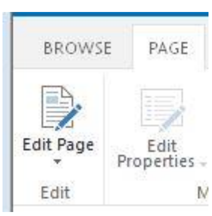
The left side of the Project Summary web part includes a countdown to the due date for the next task shown on the timeline. If the timeline is not displayed, the web part counts down to the due date for the task with the closest future due date. Next to the countdown, the web part can display either the timeline for the project, or a list of late and upcoming tasks and calendar events. You can use the arrow buttons, at the upper-right corner of the web part, to alternate between the timeline and the late/upcoming tasks and events.

The procedures in this section are adapted from the following article:

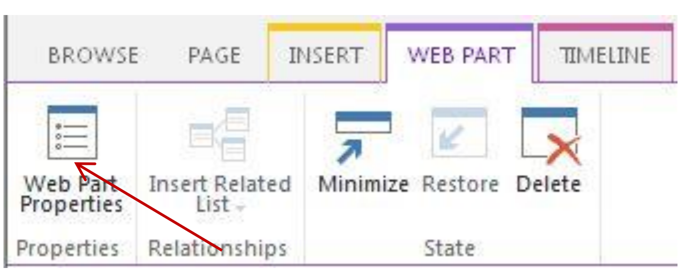
View tasks and events in the Project Summary web part: http://office.microsoft.com/en-us/sharepoint-help/view-tasks-and-events-in-the-project-summary-web-part-HA102921509.aspx

7.2 Change which timeline is used on the Project Summary web part:

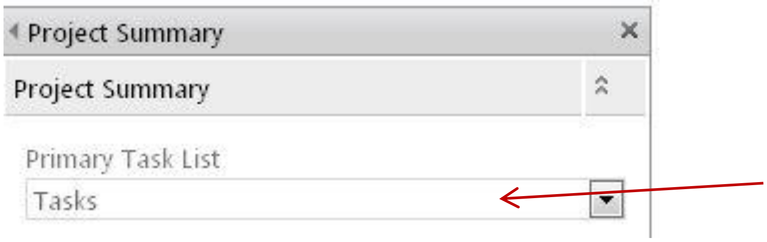
1. On the Page tab, click **Edit page**.



2. Click once in the Project Summary web part, and then, on the Web Part tab, click **Web Part Properties**.

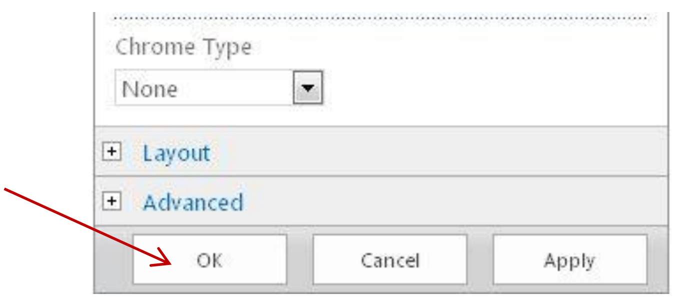


3. Choose the **Primary Task List** for the web part from the Primary Task List dropdown menu. (This is the task list that is used for the due date countdown, and it determines which timeline is displayed.)

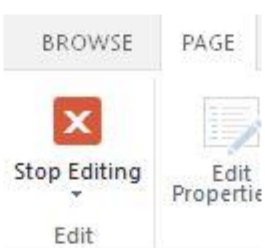


4. If you don't want to include a timeline on the Project Summary web part, under Headlines, clear the **Timeline** check box.

5. To save your changes, click **OK** on the **Project Summary** web part properties box.

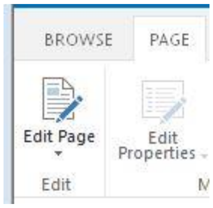


6. On the Page tab, click **Stop Editing**.

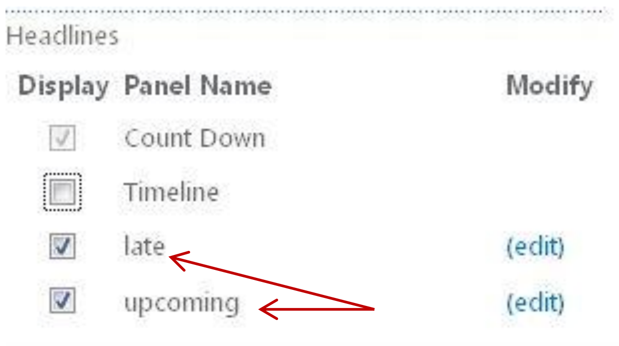


7.3 Change the late and upcoming lists on the Project Summary web part:

1. On the Page tab, click **Edit Page**.



2. Click once in the **Project Summary web part**, and then, on the Web Part tab, click **Web Part Properties**.
3. From the Project Summary form, under the Headlines area, select the check box next to **late** and/or **upcoming** for each list that you want to include in the web part.



4. If you have multiple task lists on the site, and you want to include more than just the primary task list in the list of late tasks on the Project Summary web part, click **edit**, next to **late**.
5. Select the check box next to each task list that you want to include in the list of late tasks, and then click OK. (Skip this step if you are not changing the list of late tasks.)

6. To change what tasks and events are included in the upcoming list, click **edit**, next to **upcoming**. (If you are not making changes to the list of upcoming tasks and events, skip to Step 9.)

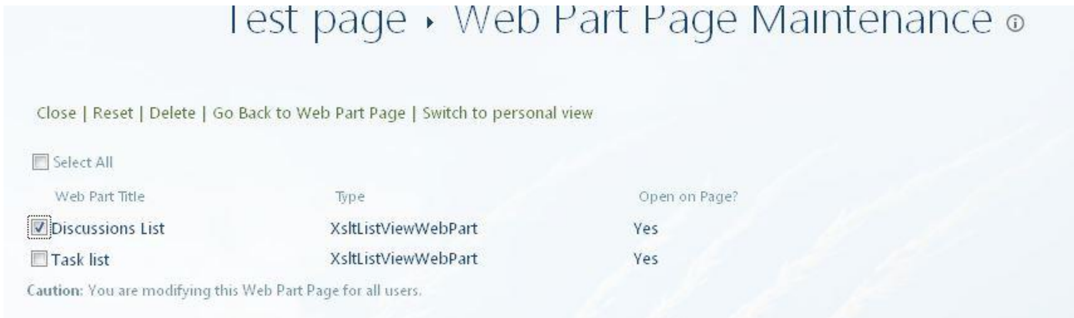
7. Select the check box next to each task list or calendar that you want to include in the list of upcoming tasks and events.
8. If you want to change the timeframe for upcoming tasks and events, you can type a different number of days in the box next to Show items for the following number of upcoming days, and then click **OK**. By default, the Project Summary web part includes tasks and events that have due dates or that are occurring within the next 14 days.
9. Click **OK** on the Project Summary web part properties box.
10. On the Page tab, click **Stop Editing**.

7.4 Open and use the Web Part Maintenance page

If you encounter problems with a Web Part or Web Part connection on a page, you can use the Web Part Maintenance Page to help isolate and fix your problem.

1. Navigate to the Site Pages library that contains the page. (Options gear/ Site Contents/ Site Pages)
2. Select the page and click the **Files** tab.
3. From the ribbon, click **Edit Properties**.
4. Click **Open Web Part Page in maintenance view** to display the Web Part Maintenance Page.

5. Verify that you are in the view that you want- either a personal view or shared view. If you need to switch views, do one of the following:
   - If you are in a personal view and you want to switch to a shared view, click **Switch to shared view**.
   - If you are in a shared view and you want to switch to a personal view, click **Switch to personal view**.



6. Select one or more Web Parts, and then do one of the following:
    - To move a Web Part to the Web Part Page gallery, click **Close**.
    - To remove personal property values and revert to the shared property values of the Web Part, click **Reset**. (You are prompted for confirmation before resetting a Web Part.)
    - To permanently delete a Web Part from the page, click **Delete**. (You are prompted for confirmation before deleting a Web Part.)

    NOTE: If the 'Allow editing in personal view' box is unchecked, a Web Part may only be deleted in a shared view.

7. When you finish, click **Go Back to Web Part Page**.

NOTE: You cannot use the Web Part Maintenance Page to close, reset, or delete a static Web Part (that is, a Web Part outside of a Web Part zone). To maintain a static Web Part, you must use a SharePoint-compatible Web design program, such as Microsoft SharePoint Designer 2013.

For more information, please see the following article: *Open and use the web Part Maintenance Page*: http://office.microsoft.com/en-us/sharepoint-help/open-and-use-the-web-part-maintenance-page-HA104046809.aspx